



Instructor's Guide

Light The Fire

Leveraging Appraisal for Maximum Performance



EDGETraining
systems inc.

By Tony Iyooob

Light The Fire

Leveraging Appraisals For Maximum Performance

Instructor's Guide

Purpose:

This course is designed to help participants investigate systematic and structured processes that lead to improved performance and measurable achievements of goals & objectives that are aligned with the company as a whole.

Audience:

This class is designed for employees at all levels of development.

Class Size:

Approximately 12 to 24 participants.

**Workshop
Timeline:**

The above Gantt Chart shows a visual of the class timeline. Blue bars represent lecture, Red bars represent group activities or interaction, and Magenta Bars represents Video Component.

**Materials/
Equipment:**

The following materials are recommended for this course:

- ◆ Video: Edge Light The Fire
- ◆ Flipchart stand and paper or dry erase board
- ◆ Notepaper
- ◆ Tent cards or name tags
- ◆ Edge Light The Fire Workbook, PowerPoint & Projector

Organization:

The Leader's guide is designed to be used with the supporting Participant Course Book and the video titled *Light The Fire*. Leader's notes are to the right of the corresponding slide


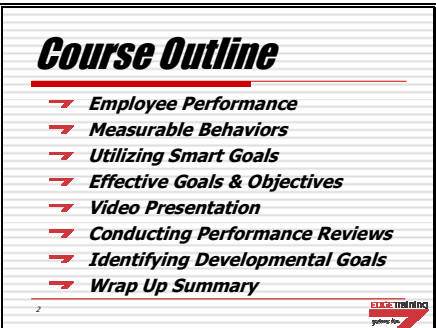

Duration:

2 to 4 hours.




Summary




The activities in this Course Book are designed to allow the instructor to tailor the curriculum to fit specific class needs. Some activities may be altered or omitted. Depending on time allotment and participant needs, instructors may wish to omit certain activities. Additionally certain activities can be expanded to include individual, partner, small group or whole class options.

[illegible]

<p>Slide 1</p>		<p>Welcome the group to Light the Fire, Leveraging Appraisals For maximum Performance</p> <p>Have participants sign in using the edge workshop sign in form.</p> <p>2 Minutes Opening Slide</p>
<p>Slide 2</p>		<p>Cover course outline</p> <p>2 Minutes Page #1</p>
<p>Slide 3</p>		<p>Discuss the course objectives</p> <p>2 Minutes Page #2</p>

<p>Slide 4</p>	<p><u>Why Appraise Performance?</u></p> <ul style="list-style-type: none"> ➤ Links Performance To Development ➤ Identifies Strengths & Areas For Development ➤ Serves As A Base For Performance Discussions ➤ Provides Necessary Documentation To Support Promotions, Increases, Etc. <p><small>EDGE Training getting the job done</small></p>	<p>Throw this question out to the group, after responses from the group, show the slide and explain in detail the reasons we as managers need to appraise performance.</p> <p>5 Minutes Page #3</p>
<p>Slide 5</p>	<p><u>Employee Performance</u></p> <p><i>Why Don't Employees Do What They Should</i></p> <ul style="list-style-type: none"> ➤ Don't know <u>what</u> they are supposed to do ➤ Don't know <u>how</u> to do it ➤ Don't know <u>why</u> they should do it ➤ Think <u>they</u> are doing it ➤ There are <u>obstacles</u> beyond their <u>control</u> ➤ The just don't want to do it <p><small>EDGE Training getting the job done</small></p>	<p>Why don't associates do what they are supposed to do? List responses from the group on a flip chart accepting them all and then revealing this slide</p> <p>10 Minutes Page #4</p>
<p>Slide 6</p>	<p><u>Measurable Behaviors</u></p> <p>Behaviors A Person Says Or Does That Can Be Observed And Measured</p> <ul style="list-style-type: none"> ✓ Can It Be Measured? ✓ Can It Be Quantified? <p><i>In Your Table Groups Identify The Measurable Behaviors In Your Notebook On Page #6</i></p> <p><small>EDGE Training getting the job done</small></p>	<p>A behavior is anything a person says or does that can be observed and measured.</p> <p>Questions that we would ask to determine if a statement describes a behavior. Can it be measured? Can it be quantified?</p> <p>Why is this important to a manager? Many managers waste a lot of time trying to correct or change attitudes, perceptions, etc. This time could be more effectively spent identifying the correct behaviors and reinforcing them.</p> <p>10 Minutes Page #5 & #6</p>

<p>Slide 7</p>	<p><i>Setting Goals & Objectives</i></p> <ul style="list-style-type: none"> ➤ Setting Goals Is An Important Part Of Improving Employee Performance ➤ Goals Provide A Structure, Focus & Ways To Measure Improvement ➤ Your Job As A Leader Is To Help Your Employees Write Goals That Are Clear, Concise, Measurable And Self-Fulfilling <p>7 </p>	<p>Explain the importance of setting goals & objectives</p> <p>5 Minutes Page #7</p>
<p>Slide 8</p>	<p><i>SMART Goals</i> Page #8</p> <p>Specific: Be sure to focus on specific issues, behaviors or actions. Seek Clarity!</p> <p>Measurable: Put a measurement system in place. If you can't measure something, you can't manage it</p> <p>Achievable: Be sure to set a goal that you know is attainable and achievable</p> <p>Relevant: The goal must be relevant to their job or to the organization's success</p> <p>Timebound: There must be a timeline associated with goals in order to follow up and coach</p> <p>8 </p>	<p>Setting goals is an important part of improving the performance of your employees. Otherwise, you set people up for failure and they might never reach their performance goals.</p> <p>Facilitator: As you read off each acronym letter, provide a brief description of what it means and have participants complete page #8.</p> <p>SMART goals ensure that the goal you write is able to be accomplished by your employee.</p> <p>5 Minutes Page #8</p>
<p>Slide 9</p>	<p><i>SMART Goals</i></p> <p><i>Think Of An Opportunity You Have In Your Area And Write A Smart Goal For One Or More Of Your Employees</i></p> <p>Page #9 In Your Workbook</p> <p>9 </p>	<p>We're going to practice writing a SMART goal. For this activity, each person will need a partner. You will each pick a goal (work or personal). Individually, write out your goal and make sure that it is SMART. Then, share your goal with your partner. Your partner will then make sure your goal is SMART.</p> <p>10 Minutes Page #9</p>

<p>Slide 10</p>	<p><u>Light The Fire Video</u></p> <p><i>As You View The Video</i></p> <p>Please Take Note Of The Process For Setting Measurable Goals & Objectives</p> <p>Be Prepared To Report Out To The Group</p> <p>10 </p>	<p>Light The Fire Video</p> <p>24 Minutes Page #10</p>
<p>Slide 11</p>	<p><u>Light The Fire Video Debrief</u></p> <p>In Your Table Groups</p> <p>List Your Ideas From The Light The Fire Video</p> <p>Be Prepared To Report Out To The Group</p> <p>11 </p>	<p>Video Debrief</p> <p>Debrief the highlights of the video by asking participants to list their thoughts and ideas and share these with the group</p> <p>5 Minutes Page #10</p>
<p>Slide 12</p>	<p><u>Time For A Break</u></p> <p>12 </p>	

Slide 13

Personalized Action Plan

- *State your objective (what do you want to do?) regarding this particular strength or need.*
- *Plan appropriate actions, learning experiences, and exercises to further develop this area.*
- *Identify other people and resources that you can turn to for assistance in developing this area.*
- *Finally, set specific target dates or milestones for completion of these development activities.*

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Explain the steps and purpose of creating personalized action plans

5 Minutes
Page #11

Slide 14

Sample Action Plan Page #13

Vision: To facilitate a smooth transition of the department to the next six weeks.	Objective: To publish a weekly newsletter summarizing current information about the upcoming change and distribute to all staff by Friday of each week.
Assessment: Lots of rumors flying and people are getting worried. Need to get our facts out.	
Actions I will take: 1. Interview leaders and gather info. 2. Write articles for newsletter. 3. Call people for volunteer. 4. Design newsletter layout. 5. Write articles and write headlines. 6. Create for late morning report. 7. Finalize layout. 8. Print newsletter. 9. Prepare and find newsletters. 10. Distribute newsletters.	People / Resources to help me: Susan and Robert Dana and Albert Walter Lenny Dana and Albert Lenny Walter Susan, Robert, Dana and Lenny Susan, Robert, Dana and Lenny
	Target Dates: Completed (writing) Completed (volunteering) Completed (volunteering) Completed (volunteering) Thursday by noon Thursday by 2pm Thursday by 5pm Friday by 11am Friday by noon

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Explain the sample action plan

5 minutes
Page #12

Slide 15

Personalized Action Plan

***Create Your Own Action Plan
Using The Template On Page #13***

***Feel Free To Pair Up
With A Partner***

Keep In Mind SMART Goals

15

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Have participants pair up with a partner and create a personal action plan using the template on page #13. When complete, have participants share with the group

15 Minutes
Page #13

Slide 16

Developing Others

Help Your Employees Achieve Their Goals

- Identify Current Knowledge & Abilities
- Recommend Personal Development
- Provide The Proper Resources
- Remove Obstacles Or Barriers
- Continuous Mentoring, Coaching, Recognition
- Encourage Ongoing Dialogue & Feedback

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Explain the process of developing goals and objectives for others

5 Minutes
Page #14

Slide 17

Determining Existing Skills

***Complete The Template For
Identifying Developmental Needs
Page #15***

Current Skill / Knowledge	Developing Skill / Knowledge	Coaching Opportunities	Formal Training Needs
What do they know or are able to do today?	What more do they need, want or desire to be able to do in the future?	What coaching or mentoring will they need from you?	What specific training needs will you need to provide?

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getting better

Complete the identifying the developmental; needs for others using the template on page #15

Have participants complete the activity using the area of development example.

15 Minutes
Page #15

Slide 18

Action Plan For Others

Pair Up With A Partner

***Complete The Action Plan For
Developing Others On Page #16***

***Focus In On One Strength And
One Developmental Need***

18

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getting better

Have participants create an action plan for developing others using the template on page #16

15 Minutes
Page #16

Slide 19

Performance Appraisals

- Think Of Performance Appraisals As A Process
- Prepare In Advance For The Appraisal
- It Requires On-Going Feedback & Coaching
- It Involves Rewards And Recognition
- Take The Time To Work The Appraisal Process
- You'll Maximize The Performance Levels Of Everyone, Both Your Employees, And Yourself

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getting better

Explain the process of conducting performance appraisals

5 Minutes

Slide 20

Performance Appraisals

Some Things To Remember

- Judge The Performance, Not The Performer
- Be Specific & Descriptive In Your Evaluation
- Support Statements With Specific Examples
- Provide Constructive Feedback & Coaching
- Let Employee Share Opinions And Thoughts
- Actively Listen Without Evaluating

20

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Hit on these basic tips for conducting performance reviews

5 Minutes

Page #17

Slide 21

Performance Process



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This graphic represents a performance review cycle.

Explain the 4 steps in the cycle. Most performance appraisals are completed as a task, vs an ongoing process throughout the entire review cycle.

Taken in steps, this process allows for continuous feedback, two-way communications as well as stating clear expectations

5 Minutes

Page #18

Slide 22

Performance Process

Manager & Employee Meet

- Define Employee's Performance Expectations
- Determine Measurement System
- Link Performance To Departmental Goals
- Set A Date For The Progress Review Discussion

22

STACE Training
getting there

Explain Step #1 in the cycle.

2 Minutes
Page #19

Slide 23

Performance Process

Meet ½ Way Through The Cycle

- Define Employee's Performance To Date
- Determine Course Corrections
- Adjustments To Goals Or Objectives
- Set A Date For The Annual Review Discussion

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STACE Training
getting there

Explain Step #1 in the cycle.

2 Minutes
Page #19

Slide 24

Performance Process

Meet Near The End Of Review Cycle

- Employee Completes Self-Evaluation
- Manager Completes Evaluation
- Discussion Of Any Differences
- Discussion Of Manager's Final Ratings

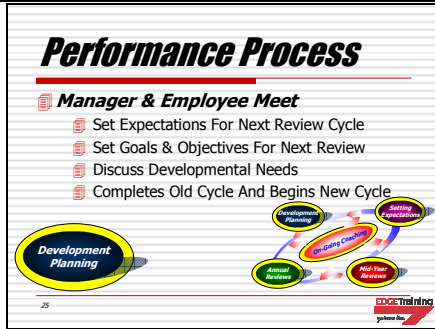
24

STACE Training
getting there

Explain Step #1 in the cycle.

2 Minutes
Page #19

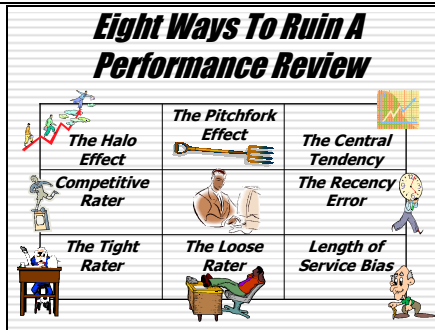
Slide 25



Explain Step #1 in the cycle.

2 Minutes
Page #19

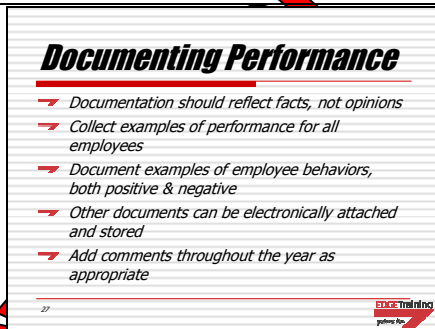
Slide 26



“These are the 8 most typical errors managers make in completing performance reviews.”
Explain in detail the definitions for each rater type.

10 Minutes
Pages #20, #21, #22

Slide 27




Explain the importance of creating proper documentation for all employees, and reviewing this documentation with the employee

5 Minutes
Page #23

Slide 28

What To Document

- **Achievement**
 - Exceptional Achievement, Special Projects
- **Attendance**
 - Dates, Times, Reasons
- **Feedback**
 - Progress Review, Observations
- **Problems**
 - Facts, Disciplinary, Violations, Examples

28 


Explain “what should we document?”

5 Minutes
Page #24

Slide 29

Documentation Pitfalls

- **No Written Explanation Of Reasons Behind Discharge**
 - ✓ A critical incident takes place. No final write-up is done. Six months later the employee files for unemployment compensation and we can't remember why we fired him or back up our decision.
- **Missed Opportunities**
 - ✓ Lack of time or failure to review records periodically, we do not act when we could. Then, when we want to act, we have to go back a few steps. Or, the employee never repeats that offense.
- **Failure To Be Consistent**
 - ✓ We do not document the same things on all employees.
 - ✓ We give pay increases to employees who are not performing.
 - ✓ We let a person's performance slide, we document every minor infraction.
- **Making Subjective Comments**
 - ✓ Making such comments as "He's lazy", "I don't think he can learn that", is subjective, not objective, and takes the credibility away from your records.


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Slide 30

Documentation Pitfalls

Accurate Documentation
Not Only Reflects
Employee Performance

It Also Reflects Your
Performance

30 


Version Not For Training

Pre

Slide 31

Beer Model Feedback

- **Behavior**
 - Describe The Behavior
- **Effect**
 - Describe The Effect On Others
- **Expectation**
 - Define Your Expectation
- **Result**
 - Define The Results Or Consequence

31 

Explain this method as a quick and easy way to provide feedback, for both positive and negative behaviors.



5 Minutes
Page #26

Slide 32

Beer Model

Use The Beer Model To Prepare Feedback Using The Examples On Page #27

- Behavior
- Effect
- Expectation
- Result


32  

Activity


Working in groups of two or three, each individual will select one of the situations below and write a BEER feedback message. Individuals will then share their written message for the group to discuss and edit.

15 Minutes
Page #27


Slide 33

 **Important Notice !!**

If A Manager Has Done A Good Job At Day-To-Day Coaching And Giving Feedback, There Should **Never** Be Any "Surprises" On An Employee's Performance Review.

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Slide 34

 **Important Notice !!**

Unless Employees Have Heard Clearly, Directly And Honestly From You About Improvements Needed, Employees Will And Should Expect Nothing Less Than An **"Acceptable"** Rating On Their Performance Reviews.

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Slide 35

Performance Tips

- Developing SMART Goals
- Measurable Behaviors
- Setting Goals & Objectives
- Identifying Needs
- Developing Others
- Sample Forms

Page #28

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Have participants go to page #31 and explain the quick reference sheets on communications & non-verbal communication.

5 Minutes
Page #28

Slide 36

THANK YOU

EDGE Training

Slide 37



Solicit and respond to any questions the group may have. If you do not have an answer, list question with name of person and email or call them with the answer when you have the answer.

Have participants complete course evaluations, stand in the back of the room while participants complete course evaluations and thank them for their participation as they exit the room.

Course Evaluation (Last 2 Pages In Workbook)

Preview Version Not For Training

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